



Joseph A. Horbal
Commissioner

REAL ESTATE AND MOBILE HOME TAX RELIEF APPLICATION

Office of the Commissioner of the Revenue
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2005

*** **All renewal applications must be filed by April 1, 2005** ***

Tax ID No.: _____ ☐ Renewal Application

☐ First-Time Applicant

Applicant's Name: _____
Last First Middle

Address: _____

Date of Birth: _____ Soc. Sec. No.: _____ Phone: _____
Co-applicant's Name: _____ Check one: ☐ Spouse ☐ Co-owner
Last First M. I.

Address: _____

For Office Use Only

Date Rec'd _____

☐ Real Estate
☐ Elderly
☐ Disabled
☐ Mobile Home

ID # _____

Bill _____

Date of Birth: _____ Soc. Sec. No.: _____ Phone: _____

Name(s) as shown on real estate tax bill: _____

Is this property: over one acre? ☐ Yes ☐ No occupied by the applicant as the sole dwelling? ☐ Yes ☐ No

General Eligibility Requirements¹

- Applicant must have an ownership interest as of December 31, 2004, in the property for which tax relief is sought.
- Applicant must be 65 years old or older, or totally and permanently disabled, as of December 31, 2004.
- Gross combined income from all sources of the applicant, spouse, and applicant's relatives living in the dwelling must not exceed \$47,200. **Note: documentation of all sources of income (including a copy of your 2004 federal income tax return, bank statements, broker statements, etc.) will be required, without exception.**
- Net worth of the applicant, spouse, and all co-owners as of December 31, 2004, must not exceed \$109,100 (excluding the dwelling and up to one acre of land on which the dwelling is situated). **Note: documentation of all assets and liabilities will be required, without exception.**
- Renewal applications must be filed by April 1, 2005. First-time applicants must apply before December 31, 2005.

Your Application Will Be Denied If . . .

- Income or net worth limitations are exceeded
- The application is not filed timely
- All required supporting documentation is not submitted
- The age or disability requirement is not met
- The applicant has no ownership interest in the property

¹ For a detailed statement of eligibility requirements, please see insert

FOR OFFICE USE ONLY			
	Land	Improvement	Total Value
Residence & Land Value			
Residence & One Acre Value			
Land Value Over One Acre			
Mobile Home			

Real Est./Mob. Home Eligible for Tax Relief		Annual Tax	1 st Half	2 nd Half
Percent	Tax			
	Relief Granted			
	Balance Due			

List the name, relationship, age, and social security number of ALL PERSONS, related to the applicant, who occupy the above residence.

Name	Relationship	Age	Social Security Number

GROSS INCOME

Report gross income for the CALENDAR YEAR 2004 from all sources of the applicant, spouse, and all persons related to the applicant living in the dwelling. **The applicant, spouse, and relatives living in the dwelling must include a copy of their federal income tax return for 2004 if they were required to file. DOCUMENTATION OF ALL INCOME LISTED MUST BE SUBMITTED WITH THIS APPLICATION. If more than one relative live in the dwelling, list their names AND sources of income [lines (a) through (l) below] on a separate sheet.**

SOURCE OF INCOME	Applicant	Spouse (or Co-owner)	Other Relative Name-	Totals
(a) Salaries, Commissions, etc.	\$	\$	\$	\$
(b) Pensions & Annuities				
(c) Gross Social Security or Railroad Retirement				
(d) Interest & Dividends				
(e) Refundable Tax Credits (e.g., Earned Income Credit)				
(f) IRA Distributions				
(g) Capital Gains				
(h) Rental Income				
(i) Insurance Payments				
(j) Welfare, SSI, Alimony, & Child Support				
(k) Gifts				
(l) Other (including income from trusts & businesses)				
(m) SUB-TOTAL	\$	\$	\$	\$
(n) Deduct \$6,500 from RELATIVE'S total income (not applicant or spouse/co-owner)			\$ (6,500)	\$ (6,500)
(o) TOTAL GROSS INCOME (If less than \$0, enter \$0)	\$	\$	\$	\$

NET WORTH – Note: If total asset value exceeds \$109,100, attach a list of liabilities, excluding mortgages on the applicant's sole dwelling.

Complete the following list of assets **as of December 31, 2004**. Exclude the value of the dwelling and up to one acre of land upon which the dwelling is situated. **DOCUMENTS AND EVIDENCE SUPPORTING NET WORTH MUST BE SUBMITTED WITH THIS APPLICATION.**

VALUE OF ASSETS	Applicant	Spouse (or co-owner)	Totals
(a) Real Estate (in Chesterfield County other than residence)	\$	\$	\$
(b) Real Estate (outside of Chesterfield County – attach list & copy of tax bill)*			
(c) Personal Property (motor vehicles, boats, trailers, etc.)			
(d) Checking Accounts & Money Market Accounts			
(e) Savings Accounts			
(f) Certificates of Deposit			
(g) Stocks, Mutual Funds, & Bonds			
(h) Trusts			
(i) Life Insurance (Cash Value)			
(j) IRAs, Thrift Accounts, Annuities, 401(k) Plans			
(k) Other Assets (Mortgages, Burial Plots, etc.)			
(l) TOTAL [Add lines 9(a) through 9(k)]	\$	\$	\$

I do hereby declare that the information included in this application is, to the best of my knowledge and belief, complete and true in all respects and that I am the owner of the property listed and occupy it as my sole residence.

Signature of Applicant

Date